TEXTILE FLOWS IN THE BALTIC STATES (AND WHAT THEY TELL US)

Webinar 17th April 2020

David Watson, PlanMiljø
Background

- Increasing focus on **sustainability** in textile value chain in Europe
- Key leverage point: **increasing circularity**
Where we are now

Where we need to get to

Goal of mapping
Background

• Increasing focus on sustainability in textile value chain in Europe
• Key leverage point: increasing circularity
• EU Circular Economy package – separate collection of used textiles 2025
• Baltic States play key role in circularity of Nordic textiles
• How about Baltic’s own post-consumer textiles?
Background

- Increasing focus on sustainability in textile value chain in Europe
- Key leverage point: increasing circularity
- EU Circular Economy package – separate collection of used textiles 2025
- Baltic States play key role in circularity of Nordic textiles
- How about Baltic’s own post-consumer textiles?

Goal of mapping

Provide picture of flows of textiles in Baltic States as basis for potential circularity actions

Identify challenges and opportunities for region
Wished for result

1. Annual consumption of new textiles
2. Annual consumption of used textiles
3. Separate collection and treatment of textiles from households
4. Challenges in collection and treatment
5. Quantity of discarded textiles in mixed waste
6. Imports and treatment of used textiles

Method

- Use of import/export and production data
- Use of existing picking study data plus mass balance approach
- Import/export data and survey of wholesalers-sorting companies
- Survey of charities/commercial collectors, municipal waste companies
- (output from elements 3. and 6. below)
Consumption of textiles
Household expenditure on textiles (2018)
Consumption by volume of new textiles (2018)

<table>
<thead>
<tr>
<th>Country</th>
<th>New clothing</th>
<th>New home textiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Latvia</td>
<td>4</td>
<td>2</td>
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<tr>
<td>Lithuania</td>
<td>3</td>
<td>2</td>
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</tbody>
</table>

kg/capita
Consumption by volume of new and used textiles (2018)

Estonia: 14 kg/capita
Latvia: 8 kg/capita
Lithuania: 10 kg/capita

New and 2nd hand textiles
Comparison to Nordic consumption

- Estonia
- Latvia
- Lithuania
- Denmark
- Norway

kg/capita

New 2nd hand
Collection of used textiles
Separate collection from households

Estonia
- Charities/social enterprises: 37%
- Commercial collectors: 44%
- Municipal waste companies/contractors: 2%
- Brands: 17%

Latvia
- Charities/social enterprises: 67%
- Commercial collectors: 9%
- Municipal waste companies/contractors: 7%
- Brands: 17%

Lithuania
- Charities/social enterprises: 9%
- Commercial collectors: 54%
- Municipal waste companies/contractors: 30%
- Brands: 7%
Separate collection from households

- Municipal waste companies/contractors
- Brands
- Commercial collectors
- Charities/social enterprises

Tonnage:
- Estonia: 2000 + 3000 + 1000 = 6000
- Latvia: 500 + 1000 = 1500
- Lithuania: 500 + 1000 = 1500

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Separate collection from households (as share of consumption)

<table>
<thead>
<tr>
<th></th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
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</thead>
<tbody>
<tr>
<td>Consumption New</td>
<td>25%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Consumption 2nd hand</td>
<td>30%</td>
<td>5%</td>
<td>11%</td>
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<tr>
<td>Separate collection</td>
<td>30%</td>
<td>5%</td>
<td>11%</td>
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</tbody>
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Comparison with other countries

- Consumption of new textiles
- Collection of used textiles

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<tbody>
<tr>
<td>Latvia</td>
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<td>France</td>
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<td>Italy</td>
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<td>Norway</td>
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<tr>
<td>Denmark</td>
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<td>Germany</td>
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Kg/capita

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Treatment of separately collected textiles
Treatment of separately collected textiles (all Baltics)
Treatment of separately collected textiles (all Baltics)

**Brands**
- Export for reuse/recycling: 100%
- Reuse in country: 0%
- Sold/donated to wholesaler: 0%
- Recycled in country: 0%
- Landfill/incineration in country: 0%

**(Municipal) waste companies**
- Sold/donated to wholesaler: 0%
- Export for reuse/recycling: 3%
- Recycled in country: 0%
- Reuse in country: 0%
- Landfill/incineration in country: 97%
Treatment of separately collected textiles (Estonia)
The wholesale sector
Imports of used textiles

- Estonia: 0 tonnes
- Latvia: 0 tonnes
- Lithuania: 60,000 tonnes

Domestically collected: blue bars
Imports: orange bars
Imports of used textiles

Rank in EU

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank</th>
<th>kg/capita</th>
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</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>4th</td>
<td></td>
</tr>
<tr>
<td>Latvia</td>
<td>3rd</td>
<td></td>
</tr>
<tr>
<td>Lithuania</td>
<td>1st</td>
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</tbody>
</table>

- **Domestically collected**
- **Imports**
What happens to imported used textiles?
Key messages
Consumption patterns are relatively sustainable:

- **Consumption of new clothing is relatively low** in Latvia and Lithuania
- **Clothing is used more intensely before being discarded** – not throwaway societies
- **Consumption of second-hand is high**: 1/3 of total consumption in Latvia and Lithuania, 1/6 in Estonia
Domestic collection and treatment of used textiles struggling:

- **Collection rates are low** (but increasing) in Latvia and Lithuania: majority of textiles end in mixed waste – mostly in landfill
- **Quality and value of collected textiles low and falling** – fast fashion?
- **Relatively low reuse rates** of collected textiles – around 40-45%
- Can’t compete with quality of imported used textiles
- Very few local recycling options especially in Latvia and Estonia
- **High share (42%)** disposed to landfill/incineration – including almost all textiles collected by waste companies
- No cooperation between charities/commercial collectors and waste companies in Latvia or Lithuania
- **Economic viability of collectors challenged** especially in rural areas – even more so by 2025!
Wholesale sector offer challenges and opportunities:

• 3 out of 4 largest importers *per capita* of used textiles in EU
• Baltics provide *circular economy services* to Nordics
• Sector generates 2000 – 4000 jobs in the region
• 18% of imports sold 2*nd* hand within Baltics
• Generates 17 000 tonnes of textile waste for recycling but 12 000 tonnes exported for recycling elsewhere
• Further 7 000 tonnes of textiles waste are landfilled or incinerated
Key opportunities

• Good conditions for investments in closed loop/open loop recycling facilities – large consistent supply of non-reusable textiles, sorting facilities ready for adaptation

• Good opportunities for large scale upcycling/redesign – consistent supply of used fabrics, lower labour costs, skilled workers. Sales back to Nordic markets?

• Circular consumption culture already exists

But policy commitment needed to achieve and nurture these opportunities!!
Thank you for listening!

David Watson
dw@planmiljoe.dk
What happens to textiles in mixed waste streams?

<table>
<thead>
<tr>
<th></th>
<th>Landfill</th>
<th>Incineration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>34%</td>
<td>66%</td>
</tr>
<tr>
<td>Latvia</td>
<td>97%</td>
<td>3%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>66%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Quantity of textiles in mixed waste streams?